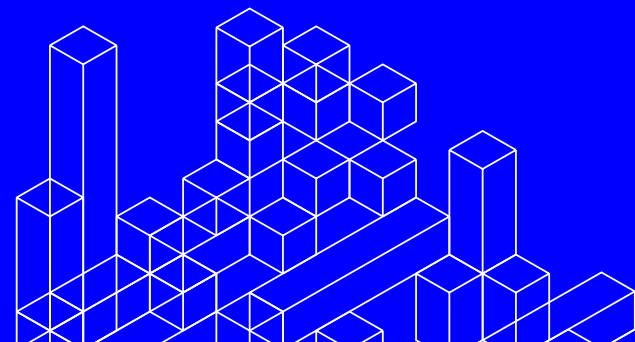# Portfolio Proposal Tool (PPT)
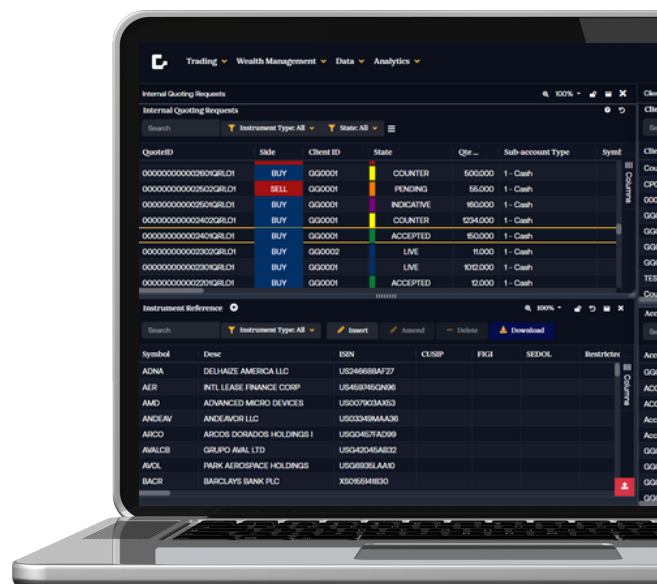
A productivity tool for Wealth Managers/Private Bankers to generate new investment business.

PPT allows wealth managers to tailor individual investment portfolios per client. Whether it is a current client or potential client the platform manages the complete workflows of wealth managers proposing portfolios to their clients. The platform audits all changes, presents portfolio performance analytics & provides internal MIS.

The Key Features:

- Insert/update default portfolio structures for each risk profile and net amount range

- Manage portfolio asset class breakdown and components within each asset class

- Multi-Asset class support, including Fixed Income, Equity, Equity Options, Structured Notes, Funds and CDs

- Integrate with external portfolio optimization tools

- Manually upload prospect's portfolio(s) held with another Provider

- Create/copy new proposal for an existing client/prospect

- Tailor portfolio to meet client preferences

- Record pending/accept/reject status of each portfolio

- Connect to quote management, EMS or OMS to execute accepted portfolios

Other Features

- All user actions permission controlled and audited

- Secure/robust design

- Provision of user-friendly Web GUI

- Integration with Genesis position keeping application (PKS) provides a complete view of current positions and proposed portfolio

About Genesis

Purpose built for financial markets. Genesis enables financial market organizations to innovate at speed through our low-code platform that supercharges developers to build resilient, performant and secure applications with unmatched efficiency and scale. Genesis provides freedom from legacy and replaces the buy vs. build challenge with a buy-to-build solution.

Speed: reusable components and a suite of development tools that boosts productivity and radically accelerates speed to market.

Performance: capable of handling the high volume and complex business requirements of financial markets' organizations.

Composability: growing suite of highly composable and customizable building blocks provides the flexibility and scale needed to meet current and future application needs.